OLA Testing
Interview Recruitment Phone Script

Hi, may I speak to [Taxpayer's Name]?

IF PERSON NOT AVAILABLE, READ: Okay, thank you for letting me know. Can you provide a different phone number to reach [Taxpayer's Name]? or let me know the most convenient time to contact them?

RECORD THE RESPONSE_____

Thank you for that information. Hope you have a great rest of your day (end phone call).

IF YOU GOT THE WRONG NUMBER, READ: I apologize for getting the wrong number. Hope you have a great rest of your day (end phone call).

IF YOU ARE SPEAKING WITH THE PERSON, READ:
My name is [Your Name] and I'm reaching out from Pacific Consulting Group on behalf of the Internal Revenue Service (IRS). We are conducting research about the IRS Online Account website so they can understand from users what works and what needs improvement. As a user of the Online Account (OLA) website, we value your feedback. We are calling you to find out if you are interested in participating in a 1-hour recorded online interview and getting a $100 gift card. We would like to hear your thoughts and experiences about the challenges and the positives of using the OLA website. During this interview, you will also be asked to test out features on the OLA website and share the level of difficulty in using the features in real-time.

Does this sound like something you would be interested in doing?

Yes __
No __

IF NO, READ: We are so sorry you cannot participate. Thank you for your time and have a good day (end phone call).

IF YES, CONTINUE: We are happy to hear you are interested in participating in this research. Please note that your participation and everything you share during the interview will not be linked to you.

I am going to ask you a couple of questions to make sure you are eligible for this study.

1. Do you have access to a desktop or laptop computer?

IF YES, READ NEXT QUESTION

IF NO, READ: Thank you for your answer. Unfortunately, you do not qualify for this study. Thank you for your time and I hope you have a good rest of your day (end phone call).

2. How familiar are you with using online meeting tools such as Zoom or Microsoft Teams?

IF VERY OR EXTREMELY FAMILIAR, READ NEXT QUESTION

IF NOT FAMILIAR OR SOMEWHAT FAMILIAR, READ: Thank you for your answer. Unfortunately, you do not qualify for this study. Thank you for your time and I hope you have a good rest of your day (end phone call).

3. When was the last time you used the IRS Online Account?

IF WITHIN THE LAST MONTH OR BETWEEN TWO AND SIX MONTHS, READ NEXT QUESTION

IF MORE THAN 6 MONTHS AGO OR NEVER, READ: Thank you for your answer. Unfortunately, you do not qualify for this study. Thank you for your time and I hope you have a good rest of your day (end phone call).

You will receive the electronic gift card for $100 within 24-48 hours of completing the interview.

I am now going to read the timeslots we have available for the interviews. Let me know which timeslot works for you.

[TIMESLOTS]

RECORD AVAILABILITY_____

IF YES TO ONE OF THE TIMESLOTS: Thank you for choosing the timeslot that works for you.

Do you have an email address you can share with us so that we can send you reminders, your gift card for your participation and other relevant information that you will need to participate? IF YES,

IF YES, RECORD EMAIL ADDRESS: _____

IF NO, READ: No worries, we will continue contacting you using the phone number we have on file. Would you prefer for us to call a different number to schedule the interview?

IF APPLICABLE, RECORD NEW PHONE NUMBER_____

CLOSING

IF CONFIRMED A TIMESLOT: Thank you for agreeing to participate in this research study. We will contact you later this week to confirm the date and time of your interview. Have a good rest of your day!

IF NO TO ANY OF THE TIMESLOTS: Thank you for letting me know about your availability. We will give you a call if new timeslots become available.